A Window of Opportunity

The Major Themes and Ideas that Emerged in a Consultation
On
The Future of Alberta's System of
Advanced Learning and Knowledge Utilization

Hosted by the Hon. David Hancock
Minister, Advanced Education
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Prepared by
Margaret Bateman
Judith Dyck
Ruben Nelson

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Introduction

In year-end interviews, the Premier of Alberta signaled his intent to make post-secondary education his government's top priority in 2005, Alberta's centennial year. The Hon. Ralph Klein declared that advanced learning would be featured in the upcoming Throne Speech and the subject of Bill 1. Historically, the first bill of any legislative session – Bill 1 – is devoted to a fundamental commitment of the government.

In order to put this intent into action, the Hon. David Hancock, Minister of Advanced Education, began to engage the major stakeholders of the post-secondary system in a variety of discussions and strategic dialogues. In particular, he wanted ideas that could be considered for inclusion in the Throne Speech and Bill 1 – ideas about how best to transform post-secondary education in Alberta into a world-class system marked by accessibility, affordability and quality.

Given the tight time-lines to frame and write Bill 1, the only possible way to hear the ideas of large numbers of stakeholders was for the Minister to host a series of consultations on the issues, challenges and opportunities facing Alberta's post-secondary sector. On January 19, 2005, the first consultation was held at Government House in Edmonton.[1] Over 70 persons participated, including the Presidents of most colleges and all universities. Together they represented the major interests of Alberta's existing institutions of advanced education.[2] Prior to the consultation, virtually all were engaged in phone conversations in order to clarify their expectations and begin the process of gathering their ideas. Further consultations were scheduled with (a) the Chairs of the Boards of Governors of the institutions of advanced education; (b) leaders of adult community learning and (c) leaders of Alberta's Aboriginal peoples.

This consultation would not have been successful without the cooperation and service provided by several members of the Alberta Public Service and a few private sector facilitators.[3]

[1] See Appendix A for the Minister's Letter of Invitation to the Consultation and its Agenda.
[2] See Appendix B for a list of the persons who participated in the Consultation.
[3] See Appendix C for a list of the staff who contributed to this Consultation.

The Consultation

Setting the Stage

The day opened with an address by Premier Ralph Klein.[4] He reiterated the government's commitment to making post-secondary education its number one priority in 2005. Noting that health care and infrastructure needs have dominated the agenda in the past number of years, he stated that inroads have been made in those areas and it is time to shift the focus to post-secondary education. The Premier pointed out that he had recreated the Ministry of Advanced Education and appointed David Hancock as its champion. He said that merely being good was not enough for Albertans; that we must develop a great system of advanced learning. He acknowledged that the province had "some catching up to do" regarding resources and said that there will be tangible evidence of his government's commitment in his TV address, the Throne Speech and Bill 1. He acknowledged that improvement comes at a cost and that the 2005/2006 budget would address some of the pressures faced by the system. He stated, regarding access, that he believed anyone who wants to pursue post-secondary education in Alberta should be able to do so; that the quality should be second to none; and that while education isn't free, it should be affordable. He asked those in attendance to be bold and candid, adding that Alberta needs to separate itself from the pack with regard to post-secondary education.

The Minister, the Hon. David Hancock, welcomed participants by reviewing the purpose of the consultation and thanked those present for making themselves available on such short notice. He underlined the fact that this is a great time to come together because his is a new Ministry that is just beginning the work of articulating a new vision for advanced education in Alberta and he wanted to work together on its development. It's time, he said, to take advanced education to the next level – to position our system on the leading edge of advanced education anywhere in the world – and to do it in a way that ensures it is affordable and accessible. He challenged those present – the leaders of Alberta's post-secondary system – to ensure that Albertans have the education system they need. "We need to envision what needs to be done to move us from where we are to a system that enables all Albertans to maximize their human potential so they can give back to their society and the world." The Minister set out two overarching goals: (1) There has to be a place for every Albertan who wants to advance his or her education and (2) we ought to be inspiring all Albertans to take advantage of the opportunity to improve themselves. He said that these goals are the context for his commitment to increasing the access of Albertans to the system, the affordability of such access and the quality of the learning experience. He acknowledged that part of the initial equation will be additional resources and committed himself to advocating for those resources. However, he noted that much lies beyond the resources; that they are a means, not the end. He asked for a bold, thoughtful, frank and honest discussion and reminded participants that he was looking for ideas to consider for

[4] See Appendix D for the Premier's speaking notes.

inclusion in the upcoming Speech from the Throne and Bill 1. Finally, he stressed that this day's discussions should be seen as the beginning of an ongoing strategic conversation with him about the future of Alberta's system of advanced learning.

The day was then turned over to the two persons who had designed the process for the consultation – Ruben Nelson, President, Square One Management Ltd. and Margaret Bateman, Partner, Calder Bateman Communications. Ruben set the context of the discussion and stimulated participants to be far-sighted, and broad-minded with a depth of good judgment. Margaret reviewed the process and desired outcomes of the day.

Ruben Nelson noted that we in Alberta face an exceptional opportunity – one that few on the planet even dare to dream about. If we have the courage and wit, we can choose our future; we can do futures by design. He challenged the group to imagine and articulate a system for advanced learning that would meet the emerging threats and opportunities of the 21st Century.

He quoted from the Report of the 9/11 Commission:

> We believe the 9/11 attacks revealed four kinds of failures: in imagination, policy, capabilities and management.
>
> Imagination is not a gift usually associated with bureaucracies. It is therefore crucial to find a way of routinizing, even bureaucratizing, the exercise of imagination.
>
> Ways of doing business rooted in a different era are just not good enough. Americans should not settle for incremental, ad hoc adjustments to a system designed generations ago for a world that no longer exists.

The core question that he posed was, "Can we afford to continue to aspire to a better version of the world we already know or do we have to pioneer a truly new system – one that fits the unique emerging requirements of the 21st Century?" He set out three strategies for learning to cut a new organizational swath; three ways to cope with a world that we cannot yet clearly visualize – the Saturn strategy of GM, the enterprise-wide leadership strategy of IBM and the culture transformation strategy of Kodak. He challenged the group to make a serious commitment to each of these strategies as we seek a new future for advanced education in Alberta. He noted that the world doesn't care if Alberta succeeds; that success or failure is in our hands. Ruben concluded with the thought that the burden of responsibility for creating a truly 21st Century system of advanced learning and knowledge utilization rests on each person in the room – the leaders of Alberta's system of advanced education.

Margaret Bateman outlined the process for the day. Participants were divided into seven groups of approximately ten people each. Each group included representatives from different parts of the post-secondary system, including a student and persons from business and labour. Three

MLAs were among the participants: Denis Herard, MLA for Calgary Egmont; Ray Danyluk, MLA for Lac La Biche – St. Paul; and Leroy Johnson, MLA for Wetaskiwin – Camrose. Participants were invited to speak freely and fearlessly as the main objective of the day was not consensus, but insight. They were reminded that the Minister was interested in their best and most passionate advice and ideas. To increase the quality of the discussion, each group was assigned a facilitator and a recorder.

The Group Discussions

During the rest of the day the seven discussion groups took up three questions:

1. Long Term – In what strategic directions must the whole system move over the next one or two generations, if it is to develop into a truly world-class system?

2. Mid-Term – What key initiatives and projects can be implemented over the next three to seven years that will move us in the desired directions – initiatives that might become part of the Speech from the Throne and Bill 1?

3. Stones in Our Shoes – What changes can the Minister make in the next few months that will streamline processes and release energy to activate change within the system?

The Minister and Dr. Byrne, Deputy Minister, Advanced Education, spent the day moving from room to room listening to the discussions and recommendations.

The final plenary session included reflections on the day by some of the participants. Typically, the day exceeded expectations. "This is the beginning for me of an open, frank and bold discussion on where we need to be and what we need to become." The day was closed by Minister Hancock. He thanked the participants for their energy, their commitment to advanced learning and their ideas. He reinforced his intention to continue to explore and engage in strategic dialogue with them.

This Report on the Major Themes

This report has three sections:

I **Overarching Themes**

II **Ideas that Emerged** – A Compilation of the Group Discussion of Each Question

III **Appendices**

- A. The Minister's Letter of Invitation to the Consultation and its Agenda
- B. The Persons who Participated in the Consultation
- C. The Persons who Designed and Contributed to the Consultation
- D. Premier Klein's Speaking Notes

I
Overarching Themes

Several key messages emerged from the discussions of how Alberta can evolve from its present arrangements for advanced education into a world-leading system for advanced learning and knowledge utilization. In effect, these are design criteria for the desired system.

- *We, in Alberta, must fully grasp the opportunity to design and bring into life a system for advanced learning and knowledge utilization that leads the world in the 21st Century.*
  Our focus must be relentlessly on the future; on what we can become, not on what we now lack.

- *More money is required.*
  Today's funding model is not sustainable. A new funding model and new resources are needed immediately. As things now stand, some Presidents feel they must cannibalize the long-term capacity of their institutions in order to keep the doors open. In addition, a competitive culture is emerging among institutions that is leading to mandate drift and institutional self-protection, rather than cooperation. Further, the financial support system for students needs to take into account the total cost of education and not just tuition.

  The idea of a major new endowment fund devoted to the many dimensions of Alberta's evolution as a learning society should be pursued. Such endowments were seen as a way of providing long-lasting support that could nourish a thriving learning culture. A diversity of views were expressed on what forms the endowments might take, including funding for student finance (both tuition and support for students overall costs), infrastructure and research.

- *Far more than just money is required; Alberta needs a system fit for the 21st Century.*
  More money must not be added to today's arrangements without a parallel and sustained commitment to an evolutionary transformation of today's arrangements for advanced learning into a system of advanced learning and knowledge utilization that truly meets the emerging requirements of the 21st Century and capitalizes on its opportunities. In short, the whole of Alberta must become a location for learning. More specifically:

  - *It must be acknowledged that today's arrangements are elements of a system, but not yet truly the system we require.*
    The future system should be less institution-based, centralized and bureaucratized. It should be more far-sighted and sensitive to both students and the emerging world of the 21st Century. We must raise our sights and expect far more of ourselves as Alberta's leaders of advanced learning.

- *The emerging system requires leadership—a system-wide capacity for foresight, strategic leadership, vision, inspiration, encouragement and appreciation.*
  No formal capacity exists today to play this role. It must be created.

- *The emerging system must be an integrated expression of the Government's commitment to Alberta as a learning society – advanced learning that serves the whole society, the whole province, whole communities and whole persons during the whole day.*
  While better alignment with Alberta's economic requirements is needed, economic considerations still rooted in the practices of an Industrial economy must not dominate the new system. It must be understood that our emerging knowledge-driven economy is interwoven with a learning society in new and challenging ways that are not yet clearly understood.

- *Albertans need to come to understand the many values and virtues of advanced learning; that it is an investment in our common future as well as the learner's future. It is not just a current expense.*
  A sustained commitment means ongoing capital and equipment funding, continuous monitoring of the readiness and fiscal ability of students to seize opportunities, vigilance in ensuring that policies and procedures address emerging and ongoing challenges, and regular reviews to ensure funding is adequate and that strategies remain relevant.

- *Campus Alberta must be developed into a far more powerful concept – one that becomes a cornerstone of Alberta's evolution into a learning society.*
  Integrated and seamless learning that is truly distance independent emerged as a major theme. This means removing barriers to access. Some of the major initiatives identified during the day bear directly on this theme, e.g. the need for a shared and transparent application system, further development of a truly provincial e-library system and increasing the opportunities for distance-independent learning via new uses of SuperNet. Ultimately, however, far more than access should be included in the Campus Alberta concept. It must become central to our commitment to Alberta's development into a model learning society. As such, Campus Alberta also needs to be promoted so that it is understood by all Albertans. It was noted that the Campus Alberta model is a model of interconnected diversity, not a model with a centralized locus of control.

- *The system we develop must appropriately balance the diverse needs of learners, of employers and of Alberta as a whole society.*
  While many participants openly declared that their type of education needs more resources and attention, virtually all agreed that the only system that will meet our needs is one that is both integrated and diverse. The system we seek must include major urban research universities and learning in small rural towns; abstract thought combine with dialogue and hands-on learning by doing. It was also recognized that

our commitment to balance must not be an excuse for avoiding tough decisions and settling for mediocrity.

- *We should explore and develop new partnerships with organizations in every sector that support advanced learning.*
  We can be much more innovative in learning to use every location as a learning location; to provide incentives for advanced learning with those who are now ready to contribute to the development of a diverse and vibrant advanced learning system.

- *Advanced learning in rural Alberta needs to be rethought and strongly connected to the work of revitalizing the countryside.*
  Several ideas are clustered in this theme. Far too many students must leave their homes in rural Alberta if they are to pursue advanced learning. This is not only personally difficult, but also feeds the further erosion of rural Alberta, especially outside the Calgary/Edmonton corridor. The rural colleges can play far more creative roles in their areas than can city-based institutions – roles in community development, economic development, health development and personal development. In short, we need to learn to use the rural colleges as agents of rural revitalization, not only as delivery outlets for learning.

- *Advanced education needs to be re-thought in relationship to aboriginal peoples.* Action must be taken to ensure that the present gap in education levels is closed in one generation.

- *The emerging system must become relentlessly international in its perspective.*
  The 21st Century will be the first truly global century; Alberta's younger generation will be among the world's first truly global citizens. We must ensure that our students have a far richer exposure to the world outside of Canada; that Alberta becomes a destination of choice for international students seeking advanced education and that the personal and institutional ties between Albertans and the rest of the world are extended, deepened, sustained and capitalized on.

- *While we cannot wholly anticipate the shape of the future, we can develop a new, serious system-wide capacity for strategic foresight, and develop institutions and a system that is far more responsive, flexible and creative.*
  A new capacity for strategic foresight – one that serves the whole system – is required. A flexible and responsive system is one in which credit for learning is even more transferable. A flexible system would capitalize on the virtues of private colleges and allow institutions to adjust their mandates in order to meet emerging needs. It was recognized that the ability to be responsive and flexible is proportional to autonomy and empowerment – part of the way to unlock this may lie with a new governance structure of the system. In short, we should aspire to developing a system that is exemplary in its leadership, its culture and its structure, as well as its operations.

- *Finally, all of these themes need to be tied together under an overarching theme that can inspire Albertans.*
  Alberta's evolution into a learning society could be the focal point that is needed for all the efforts of the Minister and his whole Ministry. As it stands, there is no good example anywhere in the world of a society that has made a formal commitment to transform itself into an exemplary learning society. Why not Alberta? If Alberta became a living learning laboratory for the world we would earn attention and a priceless reputation for insight, relevance and courage that cannot be earned in any other way.

II
Ideas the Emerged:
A Compilation of the Group Discussions

Session One – The Long-term Focus

The following statement was provided to frame the discussion:

The year is 2025. Alberta is widely recognized as having a world-leading, society-wide system for the creation and utilization of advanced knowledge.

Questions:

1. What strategic directions need to be pursued over the next generation in order to bring this about? What milestones or measures would we use to mark our progress?

2. What big society and system shaping idea or project would be instrumental in moving the system in the desired directions?

Discussion

The strategic directions discussion, while often referring to the issues of access, affordability and quality, centred on the role that a thriving post-secondary system can play in supporting and nurturing a prosperous, strong and open society that makes "Alberta the best place to live, work and visit."

The strategic directions discussion included the following points:[5]

- Treat education as an investment for the whole society and not just for students.
- Ensure that the K to 12 system is part of the development of a world-leading and system-wide post-secondary system.
- Develop a strong relationship among business, labour and the learning system. This will help unleash innovation throughout the system and the economy.
- Broaden the view of learning to encompass many fields of endeavour. Our society will not be as rich and attractive without the arts, people skilled in personal services, and quality leisure opportunities. Alberta will not be world-class if we can't attract people to move here. "Our system needs to be value- as well as information-based."
- A learning society requires learning everywhere. "We need to maximize the experience of students both inside and outside the classroom."
- Maximize the number of Albertans that participate in and make the transition to post-secondary learning. In order to do so, single parents, Aboriginal peoples and those living

[5] The order of the points in the appendix does not reflect an order of priority.

in rural Alberta will need to be targeted. "Education shouldn't be an experience only for the elite." The system must be made affordable.

- In the move to a knowledge-based economy, we need to be a world leader in research. We have the opportunity, particularly in the areas of energy and renewable resources. "We also need to broaden our view of research to include applied research that can take place at the technical institute and college level."
- Attracting and retaining faculty and researchers is imperative.
- The number of graduate students must increase. "Graduate students are valuable, not only in terms of academia, but also for the research contribution they make. Research is critical for making our province competitive."
- Rural learning opportunities must be enhanced and the excess capacity that exists there needs to be used wherever it exists. "Access now usually centers on marks for urban students, yet for rural students it seems to center around geography and proximity to learning."
- Transferability is critical if we are to have an attractive and world-class system.
    - "In the context of globalization, a learner may end up far beyond his/her original locale and we need to ensure transferability, nationally and internationally."
    - Regardless of the institution, "we need to ensure that all credentials are recognized within Alberta."
    - Cross-training and multi-skilling between academic disciplines and programs needs to be encouraged.
- The value of all types of post-secondary education (degrees, diplomas and trades, private/public) needs to be recognized. "Trades need to be seen as having equal stature with university degrees and college and technical institute diplomas and certificates."
- Our focus must be international. We need to attract more foreign students and collaborate with other jurisdictions and countries to strengthen faculty and the calibre of education. Using technology to facilitate this is part of the solution.
- "We need to look forward instead of through the rear view mirror."

A series of potential milestones and measures were noted:

- Alberta would have the highest participation rates in the world.
    - Our high school completion rate would be world-leading.
    - Young people will expect to go to on for post-secondary training. "We need to develop the mindset to encourage higher education during the early education experience."
    - Students no longer have a limited view of options, especially in rural areas and the aboriginal community. Career counseling and aptitude testing is readily available.
- Community learning centres would exist throughout Alberta and would be supported by "access facilitators".
- Aboriginal peoples would be highly involved. "If we haven't significantly increased aboriginal participation in post-secondary education by 2025, we will have failed."

- 25,000 new spaces would exist within the system; and if people had the ability to do a program, not just the marks, they could enter a program.
- Equivalencies would evolve to the point where people could move seamlessly through the system, including movement among universities, colleges and the trades.
    - "We need to be truly a system rather than independent fiefdoms."
    - "The system should let adults pick up what they need to learn with an individual, customized approach, so that they don't have to repeat courses already taken or not have prior knowledge or learning recognized."
- Education will be affordable.
- Endowment funds would provide a strong base for the system and encourage participation from the private sector. Expand the scholarship pool rather than reduce tuition fees.
- Our infrastructure would support access. This means classroom space, research labs, wired institutions and communities that maximize the opportunities provided by Alberta SuperNet, etc.
- Business will contribute more to training their employees and supporting institutions.
- New businesses and new products would increase.
- Alberta would attract the faculty it needs.
- More people with higher levels of education and training would remain in Alberta or come to Alberta.
- The amount of private sector research dollars would increase.
- There would be more world-recognized research areas (e.g. such as diabetes research).
- Society would focus on culture and the arts.
- Education will be relevant and in many areas, focused on what is needed i.e. avoid increasing the credentials required for a designation if they aren't really needed.
- More students will complete the programs they begin.

Finally, groups were asked for their big ideas:

- Create an aboriginal learning institution.
- Work to ensure that every community with 3,000 plus population will be an access point, and support those centres with technology and a human point of contact - "access facilitators".
- The Ingenuity Fund and Alberta Heritage Fund for Medical Research are excellent. A parallel fund should be set up with respect to the arts.
- Set a goal of a $5 billion dollar foundation for providing scholarships by 2025.
- Create 25,000 new spaces.
- Government should match funds for scholarships and bursaries as part of a package of initiatives that support affordability.
- Increase the strength and growth (with accompanying funding) of private universities in Alberta.
- Take a portion of oil and gas revenues to create an endowment fund to support post-secondary education.

Session Two – Mid-term Focus

The following statement was provided to frame the discussion:

The year is 2005. The minister is asking for ideas for some far-reaching (three to seven years) initiatives for inclusion in Bill One or in the Speech from the Throne.

Question:

1. What major initiatives and solutions need to be implemented over the next three to seven years to ensure access, affordability and quality?

Discussion

After some general initiatives, the headings of access, affordability and quality have been used to group the ideas.

The mid-term initiatives discussion included the following:

- Set ambitious targets. "Go big or go home."
- Announce an Advanced Education Strategic Plan that contains a vision and consistent funding.
- Create E-Campus Alberta within Campus Alberta and focus on linking the 15 colleges and technical institutes.
- A $1.5 billion operating increase is needed for the system.
- Amalgamate Alberta Innovation and Science with Advanced Education and reexamine the role of Human Resources and Employment with regard to academic upgrading.
- Create three streams for operational funding:
    - Accommodate human resources in a separate account to make it predictable and tie it to inflation and enrolment.
    - Fund a second stream to support the transfer of practical skills to enable employment
    - The third stream should advance and perpetuate knowledge (research, bringing in leading minds, etc.)
- Reposition the system with respect to the mandates of individual institutions i.e. degree granting at the college level.
- Establish a post-secondary endowment and let the system figure out how to use it. An endowment fund is necessary but not a panacea, i.e. it shouldn't be viewed as a mechanism to replace ongoing support.
- Expand investment in existing research foundations and establish a new social sciences/culture/arts foundation.
- Provide incentives to encourage collaboration between institutions.
- Work with the federal government and maximize the opportunities available through federal support.

- Provide Alberta students with opportunities to study in other jurisdictions and broaden their horizons.
- Look at establishing legislation around first right of refusal (FRR) for intellectual property.

Access

- Eliminate the Access Fund, give the money to the institutions and let boards determine where spaces need to be created.
- Begin immediately to build more capacity in every corner of the province.
- Increase operating funding until Alberta is the best in Canada rather than fifth.
- Maximize the unused capacity that exists in rural Alberta. While this won't eliminate the need to create spaces elsewhere, it will help.
- Eliminate the fee differential for foreign students.
- Target First Nation/Aboriginal learners.
    - Allow on-reserve First Nations students access to provincial funding.
    - Share resource wealth with First Nations communities in order to help fund education.
- Deliver programs to where people live, rather than making them move, particularly in the areas of rural and Aboriginal education.
- Create community learning centres. If instruction is delivered electronically, ensure there is a human presence available to help people connect with the programs "access facilitators".
- Look at participating in international accreditation.
- Enhance career/program laddering to increase opportunities and smooth the transition from apprentice to technician to degree easily.
- Ensure that career counseling takes place in the high schools and ensure students are aware of changes to student financing and increased access.
- Create better incentives for industry to become more closely linked to education, whether that includes tax credits for contributions, co-op placements and internships. The United Kingdom has a model for increasing co-op and work experience opportunities that Alberta could look at.
- Examine whether there is an affordability barrier for students in professional programs.
- Make a bold statement with respect to the amount of spaces that will be created. Make targeted statements around participation rates from hard-to-attract populations, which generally are rural and Aboriginal peoples.
- Develop a way to accept all legitimate, capable students into institutions.
- Look at establishing a public/private enterprise development matching grant that would support the development of partnerships with industry e.g. a corporation like John Deere.

- The right kind of public/private collaboration could add as many as 20,000 additional spaces to the system.
- The private university providers (religious providers) could help create additional capacity and access.
- Simplify the complexity of the student loan process.
- Examine whether the need to have an employer prior to entering an apprenticeship program is a barrier.
- Recognize the additional costs of increasing enrollment.
- Fund institutions based on the number of completions rather than on the number of enrollments. This would act as an incentive to move people through and recognize prior learning.

Affordability

- Examine ways of keeping student debt low.
- Improve the student loan system. Make it less complex/easier to navigate.
    - The forgivable loan system used in Alberta at one time was good and should be reexamined.
- Increase bursaries and scholarships.
- Provide upfront incentives to students, rather than after-the-fact remission to help ease the transition from high school to post-secondary. Target the top 20-25 per cent of students, not just the top 10 per cent.
- Create a $1 billion endowment for scholarships with a return of $50 million annually. An endowment fund is necessary but not a panacea. Therefore, it shouldn't be viewed as a mechanism to replace ongoing support.
- There was much discussion on tuition levels – and a great diversity of views:
    - Two per cent of any increase to institutions should be earmarked for tuition relief.
    - Decide which is more important: new spaces or a tuition freeze.
    - Endowment funds are good; however, freezing tuition is more important.
    - Put in place a tuition freeze for about five years.
    - Don't freeze tuition. This is the student's investment in their education – and is their opportunity costs. Support other student costs instead of freezing tuition.
    - Consider tuition caps versus a freeze
    - Build incentives into the system where there is a "tuition rebate" or some equivalent.
- Part of the living cost issue could be addressed by looking at student residences. Are there enough? Are they affordable? Should they be supported by government?
- Have the funding follow the student (e.g. voucher system).
- Examine whether there is an affordability barrier for students in professional programs

Quality

- Fund areas of excellence in each institution and help ensure that dollars flow to research.
- Re-establish envelope funding for new high-quality programming (e.g. diplomas or degrees) and one for applied research in colleges.
- Encourage the recruitment and retention of faculty and develop the capacity for graduate studies. Build up the morale of educators.
- Eliminate the deferred maintenance deficit and then start establishing quality facilities.
- Create a digital library i.e. E-Library Alberta. Work that needs to be done includes digitizing all of the periodicals and negotiating agreements so that resources can be available to all Alberta students, with consideration given to extending access to all Albertans.
- Encourage institutions to develop common electronic administrative systems that can be linked between institutions. Institutions need to use a common platform (Internet, information technology and other types of IT systems) which should be purchased at the provincial level.
- Look at consolidating areas that are not a core business, such as human resources and systems support.
- Fund capital equipment purchases and leases. Establishing a $1 billion matching grant program to match $1 raised from industry.
- Establish provincial program quality standards.

Session Three – Immediate Focus

The following statement was provided to frame the discussion:

The time is now: The minister wants to know what things are within his authority to change – processes, regulations, relationships, arrangements or attitudes – that you think he should change. (i.e. things that really do not add value and consume energy, things that get in the way of getting on with the important work. We call these things 'stones in our shoes'.)

Questions:

1. (Each participant) Identify three or more 'stones' and recommend solutions for each.

2. Which issues and solutions that emerged in your group did the whole group agree on?

Discussion

The suggestions have been grouped under several major headings:

Funding:

- Increase base funding.
- Commit to a funding review.

- Enable long term budgeting i.e. two to three year budgets.
- Initiate a matching program for donations while the economy is at the current growth levels.
- Provide incentives for collaboration.
- Acknowledge and fund the indirect costs of research.
- Increase the student loan limit for a car. At $5,000, it discriminates against rural students who may need a better vehicle to travel long distances.
- Make base funding consistent and predictable.
- Make funding more equitable for private institutions.
- Streamline accounting and reporting – stop looking for the perfect financial statement.
- The province has funded four university colleges, but four new university colleges do not receive funding. The Ministry has been asked to consider this and a decision is needed.
- Increase funding for graduate students.
- Make funding programs more stable and less one-off.
- Increase money into the Province of Alberta Graduate Scholarships and create a new scholarship for PhD students.
- Provide "patience money" for the last mile SuperNet infrastructure for communities with a business plan i.e. Connected Communities.
- Make a decision on increased infrastructure spending.
- Re-examine the ASRIP allocation and how it's used.

Governance

- Fill current policy voids including degree granting. mergers and amalgamations.
- Look at whether there should be an umbrella organization for similar institutions.
- At the institutional level, rethink the governance model that was adapted from business but does not fully respond to the complex needs of educational institutions.
- Minimally, the review would look at the operational level and maximally at the service provision side. This is not easy to do under the current Act.
- The Ministry needs to get out of operational issues and into strategic issues.
- Ensure the boards have more authority to determine the appropriate numbers of seats for professional and health programs.
- Create a vision together with system partners.
- Enhance the collaborative leadership between Advanced Education, the institutions and industry.
- Increase linkages and collaboration between the K-12 system and post-secondary education.

Process/Procedure

- Do away with the plan for consolidated statements recommended by the Auditor General.
- Ensure compatible technology platforms among institutions.
- Let the system know as soon as possible about grant increases. In some instances it may eliminate the need to make cuts currently being planned.
- Provide information to private institutions about student loan defaults in a timely manner.
- Shorten the time required for getting approval for one-year programs.
- Simplify procedures around implementation with regards to the tuition fee policy. The issue is not the 30 per cent cap, but the details in implementing this. Provide as much advance notice of funding as possible.
- Computerize the registration system for apprenticeships.
- Develop a tracking system to ensure accurate data and examine whether we are measuring and reporting on the right things.

Other Input

- Provide safety training for young people in order to facilitate their participation in work and co-op opportunities.
- Credit journeyman certification into other certificate or diploma programs.
- Get a better idea of demand for spaces and the real access gap.
- Discourage the poaching that goes on for instructors, particularly in the trades.
- Alberta is seen as having developed an anti-intellectual milieu that makes it more difficult to attract the best and brightest. The minister needs to speak with pride about the system. This will help build pride within the system.
- Communicate the importance of the post secondary system to get Albertans on side with a renewed investment in education.
- Expedite degrees for colleges.
- Communicate more about the Quality Council and examine it in its role as a barrier to change.
- Aboriginal Learners:
  - Get ACAT capacity to facilitate access and transferability.
  - Recognition as First Nations Public Institutions (First Nations Accreditation Board)
  - Provide funding for aboriginal students that was cut in Human Resources and Employment.
- Implement the recommendations in the Rural Sustainability Report that relate to the role of higher education.
- Designate the colleges and technical institutions as the primary community development leaders and implementers for the Rural Development Strategy.

- Do a provincial inventory of research and innovation projects.
- Move adult upgrading back to Advanced Education from Human Resources and Employment to reduce duplication and better serve the learner.
- Work to increase the transferability to universities of advanced placement and International Baccalaureate programs offered in high schools.
- Analyze the impact that encouraging increased enrollment at larger institutions has on smaller institutions and K to 12.

III
Appendices

A. The Minister's Letter of Invitation to the Consultation and the Agenda

B. Persons who Participated in the Consultation

C. Persons who Designed and Contributed to the Consultation

D. Premier Klein's Speaking Notes

Appendix A
The Minister's Letter of Invitation to the Consultation and the Agenda

January 7, 2005

Inside address

Salutation

As Minister of Advanced Education, my immediate objective is to find new and innovative ways to improve and enhance Alberta's advanced learning system. In support of this objective, I am inviting you to join me and a host of key stakeholder representatives in a strategy forum focused specifically on three themes: *access; affordability and quality*. I want this to be an open and frank discussion with no limit to the ideas and concepts being considered.

This one-day strategic forum will be held in Edmonton at Government House, 12845 – 102 Avenue on **Wednesday, January 19, 2005** from 10:00 am – 5:00 pm. Registration and Continental Breakfast will be available at 9:00 and lunch will also be provided.

Please contact my office with confirmation of your attendance by **Friday January 14, 2005.** My telephone number is (780) 427-2025 (toll-free by first dialing 310-0000). If you are unable to attend, please call and we can discuss the possibility of having an appropriate representative come in your place.

Prior to the forum, confirmed participants will be contacted by one of our moderators (Ruben Nelson or Margaret Bateman). They will provide some additional context for the meeting and also use the opportunity to gather some of your initial thoughts in advance of the meeting. You will also receive a final agenda from them.

I very much look forward to meeting with you and hearing your thoughts and ideas during what promises to be a stimulating and informative day. I apologize for the short notice but we have a window of opportunity before us and thus having this discussion at the earliest possible time is paramount.

Yours truly,

Dave Hancock, Q.C.
Minister of Advanced Education

cc: Board Chairs

Agenda

"Window of Opportunity"

The Future of Alberta's System for Advanced Learning and Knowledge Utilization

9:00 a.m. Gathering and Networking

9:50 a.m. Participants move to the Caucus Room on the 3rd floor

10:00 a.m. Welcome by the Honorable Ralph Klein, Premier

10:15 a.m. Welcome by the Honorable David Hancock, Minister of Advanced Education

10:30 a.m. Context Setting – Ruben Nelson

10:45 a.m. Process for the Day – Margaret Bateman

11:00 a.m. **Group Meeting #1 – Long-term Focus**

The year is 2025. Alberta is widely recognized as having a world-leading, society-wide system for the creation and utilization of advanced knowledge.

Questions:

1. **What strategic directions need to be pursued over the next generation in order to bring this about? What milestones or measures would we use to mark our progress?**

2. **What big society and system shaping idea or project would be instrumental in moving the system in the desired directions?**

12:30 p.m. *Lunch – Buffet Lunch on 2nd floor*

1:30 p.m. **Group Meeting #2 – Mid-term Focus**

The year is 2005. The Minister is asking for ideas for a few far-reaching (3– 7 years) initiatives for inclusion in Bill 1 or the Throne Speech.

Question:

1. **What major initiatives and/or solutions need to be implemented over the next 3 to 7 years to ensure access, affordability and quality?**

3:00 p.m. *Break (Summary of recommendations on flip charts in the reception area.)*

3:30 p.m. **Group Meeting #3 – Immediate Focus**

The time is now: The Minister wants to know what things are within his authority to change – processes, regulations, relationships, arrangements or attitudes – that you think he should change. (i.e. Things that really do not add value but consume energy, things that get in the way of getting on with the important work. We call these things "stones in our shoes")

Questions:

2. **Identify 3 or more "stones" and recommend solutions for each.**

3. **Which stones and solutions emerged that the whole group agrees on?**

4:30 p.m. Closing (Caucus Room)

- Wrap up – facilitators lead
  Final words from the Minister

Appendix B
Persons who Participated in the Consultation

Alex Abboud
Dominique Abrioux
Warren Agrey
John Aldred
John Bachynsky
Brian Bickley
Jeanette Buckingham
Rick Buis
Don Bunch
Bill Byrne
Paul Byrne
Joe Cairo
William Cade
Lance Carlson
Russell Carr
Sharon Carry
Marvin Dewey
Ray Danyluk
Satya Das
Jon Doan
Terrance Downey
Ken Draper—
Shirley Dul
Jim Foote
Roderick D. Fraser
Deryle Generous
Roger Gibbins
Phil Gougeon
Lois Hawkins
James Henderson
Denis Herard
Mary Hofstetter
Jim Hume
Paul Hunt
Neil Irvine
Willard Kirkpatrick
Richard Kraemer
Les LaRocque
Mark Lee
Irene Lewis
Steve MacDonald
Patricia Mackenzie
Doug MacRae
David Marshall
Sharon Matthias
David Neale
Doug Nelson
Eric Newell
Jeffrey Norris
Alexis Pepin
William R. Persley
Jason Rumer
Calvin Seaman
Michael Shields
Wayne Shillington
Marie Smallface Murule
Robert Stollery
John Sutherland
Ashton Teed
H.J. (Tom) Thompson
Dan Vandermeulen
Ralph Weeks
Harvey Weingarten
Hal Williams
Duncan Wojtaszer
Ron Woodward
Paul Zits

Appendix C
Persons Who Designed and Contributed to the Consultation

Consultation Designers

Margaret Bateman, Partner, Calder Bateman Communications
Ruben Nelson, President, Square One Management Ltd.

Consultation Report Writer

Judith Dyck, Strategic Communications

Small Group Facilitators

Doug Balsden, Alberta Community Development
Deb Berg, Alberta Community Development
Don Cummings, TkMC
Ann Davidson, Alberta Community Development
Karen Doyle, Alberta Community Development
Michael Evans, Teleologic Strategic Communications Inc.
Lee Funke, Torque Consulting
Dianne Johnson, Alberta Community Development
Gene Roach, Alberta Community Development
Marie Scharle, Alberta Community Development
Fred Tyrrell, Alberta Community Development

Small Group Reporters (Department of Advanced Education)

Sandy Bellan
Thomas Djorfors
Connie Harrison
Susan Johnson
Bruce McDonald
Carol Moerth
Caroline Orchison

Ministry Staff

Debbie Andre
Bill Byrne
Carla Corbett
Shirley Dul
Phil Gougeon
Connie Harrison
Susan Johnston
Michele Kirchner
Steve MacDonald
Chris Robinson
Michael Shields
Kelly Turner

Minister's Staff

Betty Ann Hicks
Jack Janssen

Appendix D
Premier Klein's Speaking Notes

SPEAKING NOTES FOR PREMIER RALPH KLEIN

ADVANCED EDUCATION SESSION WITH POST-SECONDARY REPRESENTATIVES

JANUARY 19, 2005

EDMONTON, ALBERTA

(CHECK AGAINST DELIVERY)

GOOD MORNING EVERYONE.

FIRST OF ALL, THANK YOU ALL FOR COMING TODAY.

I ALSO WANT TO THANK ADVANCED EDUCATION MINISTER DAVE HANCOCK FOR ORGANIZING THIS FORUM.

I HOPE MOST OF YOU HAVE HEARD RECENTLY – AND I SAID IT MANY TIMES DURING MY YEAR END INTERVIEWS LAST MONTH - THAT OUR GOVERNMENT HAS MADE POST-SECONDARY EDUCATION OUR TOP PRIORITY FOR THIS, OUR CENTENNIAL YEAR.

IT IS FAIR TO SAY THAT HEALTH CARE AND INFRASTRUCTURE HAVE DOMINATED THE DEBATE IN ALBERTA THE LAST COUPLE OF YEARS.

AND RIGHTLY SO – THEY ARE IMPORTANT ISSUES.

BUT WE HAVE MADE A LOT OF PROGRESS ON HEALTH CARE AND INFRASTRUCTURE, AND NOW IT IS TIME TO SHIFT OUR FOCUS TO POST SECONDARY EDUCATION.

OBVIOUSLY, OUR FIRST DECISION WAS TO CREATE A 'STAND ALONE' MINISTRY OF ADVANCED EDUCATION – A DEPARTMENT WHOSE SOLE FOCUS IS THE BUSINESS YOU ARE IN: THE BUSINESS OF DEVELOPING SMARTER ALBERTANS.

AND WITH A NEW DEPARTMENT COMES A NEW MINISTER – SOMEONE WHOSE JOB IS TO FIGHT FOR YOU AND REPRESENT YOU AT THE COMMITTEE TABLES, THE CABINET TABLE, THE CAUCUS TABLE, AND OF COURSE, AT TREASURY BOARD.

DAVE HANCOCK IS THE RIGHT PERSON FOR THAT JOB.

DAVE IS IN THE PROCESS OF BUILDING A NEW DEPARTMENT – A NEW DEPARTMENT THAT WILL REPRESENT THE NEW REALITY – THE REALITY THAT THE QUALITY OF ONE'S EDUCATION IS THE DIFFERENCE BETWEEN THOSE WHO WILL BE MERELY GOOD IN THIS WORLD, FROM THOSE WHO WILL BE GREAT.

LET ME ACKNOWLEDGE THAT WE HAVE SOME CATCHING UP TO DO. I UNDERSTAND YOU ARE ALL FACING PRESSURES, AND I KNOW MINISTER HANCOCK HAS RECEIVED A LOT OF ADVICE ON HOW TO RESPOND TO THOSE IMMEDIATE PRESSURES.

I ASSURE YOU WE ARE LOOKING VERY CLOSELY AT YOUR ADVICE.

IN THE COMING WEEKS AND MONTHS, YOU WILL SEE TANGIBLE EVIDENCE OF OUR COMMITMENT.

IN MY ANNUAL PROVINCE-WIDE TELEVISION ADDRESS, I INTEND TO FOCUS ON POST SECONDARY EDUCATION.

WHEN THE LEGISLATURE OPENS THIS SPRING, BILL ONE – TRADITIONALLY THE BILL THAT SIGNALS THE GOVERNMENT'S PRIORITIES FOR THE YEAR – WILL BE CENTERED ON POST SECONDARY EDUCATION.

WHEN FINANCE MINISTER SHIRLEY McCLELLAN BRINGS DOWN HER 2005-06 BUDGET, WE HOPE TO ADDRESS SOME OF THE PRESSURES YOU ARE FACING. I'M NOT SAYING WE ARE GOING TO EMPTY THE VAULT, BUT I AM SAYING WE UNDERSTAND THAT IMPROVEMENT COMES AT A CERTAIN COST.

LASTLY, LET ME SAY THAT I UNDERSTAND AND SHARE THE BELIEF THAT OUR POST-SECONDARY SYSTEM IS BUILT WITH THREE PILLARS IN MIND:

- ACCESS: THE BELIEF THAT IF AN ALBERTA STUDENT WANTS TO PURSURE HIS OR HER POST-SECONDARY EDUCATION IN ALBERTA, THERE IS NO EXCUSE AS TO WHY THAT SHOULDN'T HAPPEN;

- QUALITY: THAT THE QUALITY OF THE POST-SECONDARY EXPERIENCE SHOULD BE SECOND TO NONE IN THIS COUNTRY WITH THE RESOURCES AND THE PEOPLE WE HAVE;

- AFFORDABILITY: EDUCATION ISN'T FREE – IT IS NO MORE FREE THAN OUR 'FREE' HEALTH CARE SYSTEM – BUT IT MUST BE AFFORDABLE; I AM REMINDED OF THE OLD SAYING THAT 'IF YOU THINK EDUCATION IS EXPENSIVE, TRY IGNORANCE'...

BUT ACCESS, QUALITY AND AFFORDABILITY ARE THE FOCUS.

AND NOW, I HAVE SOMETHING TO ASK OF YOU.

TODAY, I WANT YOU TO BE CANDID. AS EDUCATORS, YOU KNOW THAT THE CLASSROOM IS ONLY AS GOOD AS THE DEBATE THAT TAKES PLACE WITHIN IT.

BE BLUNT. BE BOLD. TELL US THE TRUTH. WE WANT TO HEAR WHAT WE ARE DOING RIGHT, BUT LETS BE HONEST, WE ALSO WANT TO HEAR WHERE WE CAN IMPROVE.

THIS IS NOT JUST ANOTHER 'GAB-FEST' WHERE WE 'BLUE SKY' A LOT OF NICE-TO-HAVES AND WISH-LISTS AND THEN NOTHING COMES OF IT.

DAVE HANCOCK AND HIS OFFICIALS ARE HERE TODAY TO LISTEN, NOT TO LECTURE. HE IS A NEW MINISTER. IT IS A NEW DEPARTMENT. WE NEED THE ADVICE OF THE PEOPLE IN THIS ROOM IF WE ARE TO SUCCEED.

WE MAY NOT GET IT ALL RIGHT IN THE WEEKS AND MONTHS AND, YES, YEARS TO COME. AND IT MIGHT NOT HAPPEN OVERNIGHT.

BUT OUR COMMITMENT TO YOU TODAY IS FIRM: POST SECONDARY EDUCATION IS THE FIELD WHERE ALBERTA MUST SEPARATE ITSELF FROM THE PACK.

WE GET IT.

THANK YOU AGAIN FOR COMING.

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